

# LEGACY GIFTS

*Your guide to supporting seniors in our community  
through Davie County Senior Services.*



**"NC Certified Senior Center of Excellence"**

278 Meroney Street  
Mocksville, NC 27028  
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[www.daviecountync.gov](http://www.daviecountync.gov)

## **Our Legacy Gift Mission:**

To provide seniors with the long term assurance of accessible services and opportunities for fellowship, fun and learning, through activities and programs that enrich their lives.

### **What is a Legacy Gift?**

It is a charitable contribution given to Senior Services that is a long-term way to provide programs and services for our Seniors far into the future.

### **Your Legacy Gift Will Benefit:**

- Community Dining
- Homebound Meals
- Assistance Programs for Seniors & Caregivers
- Social Activities
- Wellness Programs
- Fitness Classes
- Equipment Purchases
- Future Expansion Projects

## Leave Your Imprint !



*“The only thing you take with you when you are gone is what you leave behind.” - John Allston*

Ways to Give	Benefit to Donor
<b>Outright Gift</b> <ul style="list-style-type: none"><li>• Cash</li><li>• Stocks/Securities</li><li>• Real Property</li></ul>	<ul style="list-style-type: none"><li>• Income Tax Deduction</li></ul>
<b>Bequest</b> <ul style="list-style-type: none"><li>• Cash</li><li>• Real Property</li><li>• Percentage of Estate</li><li>• Remainder of Estate</li></ul>	<ul style="list-style-type: none"><li>• Possible Estate Tax Deduction</li></ul>
<b>Insurance Policy Beneficiary</b> <ul style="list-style-type: none"><li>• Name Senior Services as a beneficiary</li></ul>	<ul style="list-style-type: none"><li>• Income Tax Deduction when transferred</li></ul>
<b>Retirement Plan/IRA</b> <ul style="list-style-type: none"><li>• Name Senior Services as beneficiary of death benefit</li></ul>	<ul style="list-style-type: none"><li>• Opportunity to pledge a major gift today</li><li>• Estate &amp; Income Tax Savings</li></ul>
<b>Senior Services' Endowment Fund</b> <ul style="list-style-type: none"><li>• Make any of the above gifts through the Davie Community Foundation</li></ul>	<ul style="list-style-type: none"><li>• Percentage of gift goes to support Senior Services each year</li><li>• Other tax benefits still apply</li></ul>

## How Do I Make A Legacy Gift ?

### To make an outright cash gift:

- Mail your check to Senior Services
- Advise us if gift is in honor of or memory of an individual
- If so, provide information on where to send acknowledgement

### To make other gifts:

- Speak to your attorney or financial advisor to set up the type of Legacy Gift you wish to make
- Inform Senior Services of your intent

### To make a gift through the Endowment fund:

- Speak with Davie Community Foundation to set up your own endowment to benefit Senior Services or give to the fund already established

**Legacy Gifts received will be recognized once a year in our Davie County Senior Services' Annual Report available each year by August 1.**

### Donor Recognition Levels:

\$100,000+ .....	Visionaries
\$50,000 - \$99,999.....	Founders
\$10,000 - \$49,999.....	Benefactors
\$5,000 - \$9,999.....	Leaders
\$1,000 - \$4,999.....	Patrons
\$500 - \$999.....	Investors
\$100 - \$499.....	Supporters
\$1 - \$99.....	Friends